

Preparation for annual meeting **with accountant**

Think about the topics below to initiate a meaningful conversation:

Most recent accomplishment I am proud of related to my business:

The top problem I need help with (what keeps me up at night):

Short-term goals (1 year) with the business:

Long-term goals (3-5 year) with the business:

Personal changes that could or have impacted my business:

What I think I should focus on and what has fallen off my priority list related to my business:

Any changes in staffing or significant wage adjustments this year?

Short-term individual goals (e.g. paying for college, retirement, large asset purchases, charitable giving goals, care for a parent):

Long-term individual goals (e.g. paying for college, retirement, large asset purchases, charitable giving goals, care for a parent):

Discussion topics/questions to address with accountant:

- What metrics should I watch for in my financial data?
- What changes can I make right now to make me tax efficient?
- Are there any changes in the government/legislature/tax laws I need to be watching out for?